CRAIG
WORTMANN

WHAT'S YOUR STORY?

USING STORIES TO IGNITE
PERFORMANCE AND BE
MORE SUCCESSFUL

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SALESENGINE

Craig Wortmann is an entrepreneur and three-time CEO who speaks to and motivates audiences all over the world on the topics of Entrepreneurship & Sales, Storytelling and Leadership. He motivates, inspires and delights on these topics bringing them to life through the powerful stories he tells. Craig transfers his knowledge through coaching and the application of tools he has developed that underlie high performance and drive success for leaders in each of these areas.

Craig is the Founder and CEO of Sales Engine, a firm that helps companies build and tune their sales engine. Previously, Craig was recruited to join start-up WisdomTools as CEO, which he ran, grew and then successfully sold to a larger firm. And then he did it again. As the CEO of ClearGauge, an interactive marketing and web strategy firm, Craig executed a turnaround and high-valuation sale by building the sales engine, developing a new web presence, and cutting costs.

Craig is a clinical professor at the University of Chicago Booth School of Business, where he teaches Building the New Venture and Entrepreneurial Selling, an Inc. Magazine Award-Winning "Top Ten" course. Craig also designed and teaches a course called Personal Leadership Insights that looks at the knowledge, skills and discipline that serve as a foundation for developing one's own leadership capital.

Craig lives in Evanston with his wife, two children and their dog, Mr Chips.

DEDICATION

To my parents, Jeanine and Donald Wortmann. Mom, your love and persistent coaching helped my find my own voice. And Dad, you are simply the greatest man I've ever known.

   If, in the final analysis, I have been one-tenth the parent that each of you has been, I will have succeeded.

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CHAPTER 5:

THE STORY MATRIX

PANNING FOR GOLD

The second tool in our toolbox is the Story Matrix. The Story Matrix is very simple. If the Win Book is the filter of your business life, then the Story Matrix is the gold that remains when the mud and grit fall through the bottom of that filter. The purpose of the Story Matrix is to give leaders ready access to their own stories so that they can be more consistent and intentional about weaving those stories into their communications. Here the connection is made—connecting desired outcomes to the stories that will help shape behavior and action.

Think of the brain as a storage room. We are constantly accumulating information and knowledge, putting it in boxes, and throwing these boxes into our storage room. Because so much information is coming at us in a never-ending wave, we just prop the door open and throw stuff in as fast as we can.

But look at the room. It's a mess! The boxes are lying all over the place and they are piled up near the entrance. Because they haven't been consistently well organized or even labeled, we have no idea where to find anything, and we are not using the space wisely. Boxes are piled up inside the doorway and the back of the room is nearly empty. We have to step over all of the boxes of junk in the doorway just to get to the stuff we really need.

Along comes the Story Matrix, which serves as the shelving, labels, and containers for your information and knowledge—your stories. It is the organizing element that makes our knowledge and information accessible and useable.

It's one thing to have a repository of stories; it's quite another to have them organized so that they become useful. Think of some of the other artifacts of your life, such as your music collection or those photos you took on your last vacation. These are very useful to you only *if* you can find what you are looking for when you need it!

The Story Matrix represents the turning point where our stories become tools to tackle our challenges and ignite performance. We have captured the stories in our Win Book, and now we must think deliberately about where a specific story will have the strongest positive impact.

The Story Matrix is a simple spreadsheet that places a leader's stories into different categories, as in Figure 5.1. The stories themselves come from the Win Book (and other places) and they spread out like batter onto the waffle iron of the Story Matrix. Day by day, as you use your Win Book or comb through past win books, stories become apparent and are captured on the Story Matrix. Now, in retrospect, information and events that looked like only data points at the time they were happening become key puzzle pieces of a larger story.

"The age-old practice of storytelling is one of the most effective tools leaders can use. But they need to pick their stories carefully and match them to the situation."

– Stephen Denning[2]

STORY MATRIX							
		Leadership Performance Skills					
		Culture/ Company	Execution	Sales	Service	Teamwork	Me
Story Types	Success						
	Failure						
	Fun						
	Legends						

Figure 5.1 Sample Story Matrix

The grid of the Story Matrix serves as a repository for different types of stories. The horizontal axis is designed to change based on the types of challenges each leader faces. The vertical axis remains the same, and serves as a reminder to tell different types of stories to help people to see all angles of a challenge.

THE VERTICAL AXIS—STORY TYPES

In order to serve as a tool to organize your stories, the Story Matrix is structured as a grid with two axes. The vertical axis is where the nature of stories and the different types of impact they have on performance comes into play. Although not set in stone, the vertical axis is meant to be more rigid.

The categories of success, failure, fun, and legends are the broadest four categories that still have key distinctions between them. In order to ignite performance, leaders need to be telling all four types of stories, because each type of story has a different impact.

Success

We all adore success. Success stories, when they occur, are told and retold (especially if we were responsible for the success!). These stories are easy to remember and, often, they are captured in our knowledge management systems and promoted in our marketing materials. They feel good, but they also serve a very important role in igniting performance.

Success stories show the way. They let us inside a situation, as it's unfolding, to see the key twists and turns that ultimately proved to be the deciding factors. Instead of just telling us the result—We won the Miller business!—the story of the team coming together, working late nights, shoring up their weaknesses, and preparing a fantastic presentation lets us see the ins and outs of the success. We get to see where things could have gone wrong and where the right skills or ingenuity at the right time made a huge difference.

Success stories are the most obvious type of story that leaders need to be telling and including on this axis.

Failure

Yuck. Who likes to tell stories about failure? Why bother? Everyone knows they exist, so why not just let a sleeping dog lie? This category on the vertical axis of the Story Matrix serves a very important purpose.

"Stories play a big role in institutional memory—they are the principal means by which groups remember."

– Charlotte Linde[3]

"It's all invented anyway, so we might as well invent a story or a framework of meaning that enhances our quality of life and the lives of those around us."

– Rosamund Stone Zander and Benjamin Zander[4]

"Story doesn't grab power. Story creates power. You do not need a position of formal leadership when you know the power of story."

– Annette Simmons[5]

First, the explicit "failure" category is there to remind us that as leaders, we must capture and tell these types of stories. The worst thing we can do is sweep them under the rug and ignore them.

Second, our failure stories are not only relevant, but they will actually help us build performance by helping others avoid the traps we've fallen into ourselves. After all, if people can't picture what failure looks like, how will they know they are failing? It is too easy to overlook, or forget, failure stories, and this is a huge opportunity that is often missed to better connect with people, build trust, and enhance performance. Like success stories, failure stories let us inside a failure to see exactly what went wrong. Telling stories of failure has the same benefit as one of the most powerful and underutilized tools available to leaders—the win/loss debrief.

The win/loss debrief is simply a set of questions that are asked of a client or project team after a significant event has taken place, whether that event is a lost (or won) sale, a failed (or successful) project, etc. It is rare that a win/loss debrief doesn't offer key insights into your business or your approach, even when you've won and you think you know the reasons. Often, you learn about things you could have done even better that, if acted on, will increase your performance the next time.

After failures, the debrief serves as a postmortem that almost always turns into the client "telling you the story" of how you failed. You get to see each decision point and where you went wrong. It's not easy to hear this, but you most often end up having a much clearer idea of how to perform better and you certainly have increased the level of trust with your client. Similarly, sharing failure stories almost always has a *positive* impact on performance. Herb Kelleher, the famous former CEO of Southwest Airlines, once wrote, "Customers are like a force of nature: You can't fool them, and you ignore them at your own peril."[6] It's the same with your colleagues and peers *inside* the company. You can't fool them by telling nothing but rosy success stories. They know it's not real. So why pretend?

Third, and most important, our failure stories help us build strong bonds with our people. They demonstrate that we are human and that mistakes are acceptable. This is so obvious, but so often forgotten. Jim Collins, in his book, *Good To Great*, describes what he calls a Level 5 Leader. According to Collins, one of the key

aspects to Level 5 leadership is personal humility, a trait that is decidedly rare in our "celebrity CEO" culture.[7] Telling failure stories allows leaders to share what they've learned in a way that reveals that they are indeed just as fallible as everyone else. These stories break down the artificial walls that often separate the leaders in organizations. And because this is so important, there is actually a category on the horizontal axis called "Me" stories that will be explained below.

> "The good-to-great leaders were able to strip away so much noise and clutter and just focus on the few things that would have the greatest impact."
>
> – Jim Collins[8]

"WHEN HAVE YOU FAILED?"

I once found myself presenting to the entire executive team of one of my clients, including the CEO. I was there to try to expand our business with this client. As I wrapped up my presentation, the CEO asked, "When have you failed?" She wanted to understand how we thought about failure and whether we learned from it. I was not prepared for that question. So I told her the truth—we had indeed made mistakes, but we had always recovered. My response was disjointed, and it was clear that I hadn't ever really thought about it. She wasn't satisfied. I needed to use a story to illustrate my answer. Without a story, it was obvious to her that I didn't really have an answer, and that was the last time I met with her. Our client relationship never expanded.

Fun

Work should be fun. Why should we spend most of our waking hours doing something that's not fun? As leaders, we sometimes treat humor as a nice distraction when it happens, when we *should* treat it as one of our core roles. The subject of humor at work gets a clinical, cursory nod in most leadership books, *if* it gets recognized at all. This is a major oversight. And it's a huge missed opportunity. We need to add humor back into its rightful position in the workplace—everywhere. Why not?

Of course, humor should be appropriate, and it should not be used to belittle anyone. I am not talking about telling dirty jokes to break the ice. I'm talking about telling your funny stories. Tell your sales team the story about the time you were presenting to a room full of people and the arrogant, overly serious, senior-most guy in

"A good story cannot be devised, it has
 to be distilled."

— RAYMOND CHANDLER[9]

the room had just finished telling all of his minions that ubiquitous cell phones make him crazy when your cell phone begins ringing loudly in your suit pocket. (This is a true story, and it ended badly.)

Or tell your service people about the time you called the secretary of state's office to report the *great* experience you just had at the department of motor vehicles facility and his assistant, who was so surprised someone actually had a positive experience, shouted into the phone, "OH MY GOD! Hold on! Hold on! Let me grab a piece of paper!!!" (Also a true story.)

Or tell your entire organization the story of when you were about to hang up with another senior executive after closing a large deal with his company and instead of just saying, "Goodbye. Have a good day," you temporarily lost your mind and said, "Bye-bye, sweetheart. I love you." (This is also true, but it ended well.)

There are times when the only option is to get serious. And there are times when humor is the best tool in your kit. Lighten up, laugh, and learn.

In Chapter 2, we explored why stories are so powerful and why they connect to people. Fun stories provide a double dose of all of the positive aspects of a story, simply because we not only learn from them, but they are enjoyable as well.

Legends

These are the stories you already know. These are the legends of business that are passed along through the news media. One of the positive aspects (there aren't many) of the cult of the CEO that we went through in the 1980s and '90s was the stories that we learned. Stories such as Jack Welch of GE saying, "We are going to be number one or number two in every business we serve or we are not going to be in that business"; or Herb Kelleher of Southwest Airlines riding his Harley into the company's headquarters; or Bill Gates dropping out of Harvard; or Michael Dell building PCs in his college dorm room; or, going way back, Henry Ford telling his marketing people that "you can paint the cars any color you want, as long as it's black."

These are the legends that shape the ways we do business today. We all know these stories because we've all heard them dozens of times. But that doesn't make them stale. They are legends for a reason. They have staying power because they provide shortcuts for us to perform better. The story about Jack Welch helps us make better

product mix decisions. The stories about Gates and Dell inspire us to try something new. The story about Herb Kelleher reminds us to have some fun and Henry Ford reminds us to take risks (or not!).

Every leader carries these legends around. Because most of us are not trying something entirely new in business, these legends show us how others tackled these same types of challenges. Why reinvent the wheel?

THE HORIZONTAL AXIS—PERFORMANCE SKILLS

Because the Story Matrix is designed to be flexible, the categories across the horizontal axis change depending on the type of leader using the matrix and the performance skills that are most critical for that leader. A senior executive will have categories of stories that focus on motivation or execution because the scope of her responsibility is large and in inverse proportion (probably) to her grasp of specific business units or situations. A midlevel executive will have a somewhat tighter, function-specific focus with categories like "Project Management," "XYZ Client Team," or just "Teamwork." An individual contributor, such as a salesperson or consultant, will have categories like "Planning," "Execution," or "Follow-through." An entrepreneur will likely have a mix of big-picture and tightly focused categories.

One of the best ways to create your categories across the top of the Story Matrix is to ask yourself the following question: *What are the five most common functional or performance areas that I have to influence?*

The Story Matrix is organized around a leader's main responsibilities and is designed to provide ready access to the stories that will have the greatest positive impact on performance. Figure 5.2 shows a full Story Matrix for an entrepreneur (me). Because I have accountability for a whole organization, the horizontal axis contains broad categories of responsibilities versus a more specific, business-unit focus on service or operations, for example.

The Story Matrix can be focused on the past, present, or future, depending on the story. Stories are captured as they occur, so they will often have happened in the past, whether distant or very recent. But the Story Matrix also begs the question, *What kinds of stories do I want to be telling in the future?* In this way, the Story Matrix is a powerful tool to encourage the right performance moving forward.

"Most of the time, you won't be present when the people you want to influence make the decision, choose the behaviors you were hoping to influence, or both. You don't have much, if any, formal authority over them and you cannot easily predict the specifics of the situation in which they might find themselves, so how do you get them to do what you want? Story is like mental software that you supply so your listener can run it again later using new input specific to the situation."

— Annette Simmons[10]

STORY MATRIX - CRAIG WORTMANN

		Leadership Performance Skills					
		Culture/ Company	Execution	Sales	Service	Teamwork	Me
Story Types	Success	"Safety valve" Client delight Unexpected raise "I'm with you" "We are still here" Enemy at the gates	Client delight Scrabble story "Stay on target" How big is an acre? Dog bites child Beb's boom mic	Written any books? Thank you notes Adding value Gale's best day Lisa bringing kids books	Placido Domingo "Amazing" & "fun" Bag boy	Retreat '02 USB all-nighter Columbine A client becomes an investor	Van's birth Life is like a train Leaving big blue Dad's proud Dist. Achiever Forgiveness Jill - how am I doing?
	Failure	Tidal wave Circle time I KJC's story Audit CEO Perfect storm	Circle time II Oskaloosa trip Garfield's broken sidewalk Financial planning Seminars Rip Van Winkle Buttons to zippers to Velcro	Tidal wave USB all-nighter Trans vs. Rel Greatest skill?	Too many assumptions Win one for the team And then there were 7...	Columbia Shuttle Einstein's relativity	Losing control Not hired Everything's awesome? Drop Forge Playing the "greatest hits" Gyp line
	Fun	Story of wolf Van: send an e-mail Weirdest week "Sir, we have a major medical oppty" Hunter: talk to the hand	"Betty" & "Fred" Che-che...che-che...	Mom's watch Email to CEO FYMTGE Set your phasers to stun	Big hat "Betty"& "Fred" Name the ethics line	His best skill Boom	"I've got some ideas" Jungle stories Driving through Iowa with Dad Mom never giving up
	Legends	Nabisco air force Guru/master tea cup Trump $1.5BB Whisker from a tiger Stanford: foreign policy crisis	Apollo II Rock/sand/water Good enemy of great Gerstner - "tell me about" Crossing the chasm Henry Ford: "black"	Glengarry Martin Luther King Churchill Columbia shuttle Truth, naked and cold	Nordstrom's Southwest FedEx Traveler arriving at gates	US Hockey team Apollo II Gates and Dell FedEx Practice makes perfect	

FIGURE 5.2 Story Matrix: Entrepreneur

The boundaries between these different categories are not hard and fast. A story about how a project went well could just as soon be found in the "Execution" category as in the "Leadership" category. Many times, the same story can be found in multiple places on the Story Matrix because the telling of the story can focus on different elements, depending on what performance challenge is being addressed.

The one category on the Story Matrix that should be present on any type of leader's matrix is the category called "Me." The pur-

VAN'S BIRTHDAY

One of the Me stories that I tell is about the birth of my son, Van. When my wife was five weeks away from her due date, I was out of town on business in Bloomington, Indiana. Late one night, I got the call from my wife, Jill, that she was in labor and the doctor had told her to get to the hospital. Bloomington, Indiana, is 250 miles from Chicago, where we live. I was in the car within five minutes, driving 100 miles per hour, heading for Chicago—hoping to make it in time.

Jill made it to the hospital and I was in cell phone contact with her mom, who was giving me periodic updates as I got closer and closer to Chicago. My phone rang as I flew across the Chicago Skyway, about 45 minutes from home. Our son, Van, had arrived, happy and healthy. I had missed it. Arguably, the most important event in any person's life, and I had missed it. My son was 45 minutes old when I met him for the first time.

But, instead of feeling sorry for myself, I held the loudest, most joyous one-man party that the Chicago Skyway has ever seen! To this day, I look upon that experience like this: it only matters that Van and Jill were fine, not whether I was there. This story helps people understand how I look at the world. It's much more meaningful than just telling someone, "I tend to be a positive person."

pose of these Me stories—stories of personal success, failure, and fun—is to encourage leaders to let employees get to know who they are and what values they hold. Just as failure stories are important to a leader's ability to build strong connections with people, Me stories allow people to look inside you. Me stories share your values, what you truly care about, and what makes you tick.

USING YOUR STORY MATRIX

The last page of this book is *your* Story Matrix. As you recall your stories, capture them on this Story Matrix that reflects the areas you most need to influence. In order to put the Story Matrix into action, just "peel" back the top layer of the Story Matrix, and another layer is revealed, as in Figure 5.3. This layer is where the story gets outlined and applied to different types of challenges. In this layer, each story is annotated with three elements. First, the

"Personal stories let others see 'who' we are better than any other form of communication. Ultimately people trust your judgment and your words based on subjective evidence. Objective data doesn't go deep enough to engender trust."

— Annette Simmons[11]

STORY MATRIX - CRAIG WORTMANN

		Leadership Performance Skills					
		Culture/ Company	Execution				

Story Types	Success	"Safety valve" Client delight Unexpected raise "I'm with you" "We are still here" Enemy at the gates	Client delight Scrabble story "Stay on target" How big is an acre Dog bites child Beb's boom mic				
	Failure	Tidal wave Circle time I KJC's story Audit CEO Perfect storm	Circle time II Oskaloosa trip Garfield's broken sidewalk Financial planning Seminars Rip Van Winkle Buttons to zippers to Velcro				
	Fun	Story of wolf Van: send an e-mail Weirdest week "Sir, we have a major medical oppty" Hunter: talk to the hand	"Betty" & "Fred" Che-che...che-che...				
	Legends	Nabisco air force Guru/master tea cup Trump $1.5BB Whisker from a tiger Stanford: foreign policy crisis	Apollo II Rock/sand/water Good enemy of great Gerstner - "tell me about" Crossing the chasm Henry Ford: "black"	Martin Luther King Churchill Columbia shuttle Truth, naked and cold	Southwest FedEx Traveler arriving at gates	Apollo II Gates and Dell FedEx Practice makes perfect	

CLIENT DELIGHT

We went in to make a big presentation to 12 client people who would decide whether to do business with us. It was a high-stakes meeting, and we were up against tough competition. These 12 people would be evaluating us across many criteria, and after three hours, we had focused heavily on our capabilities and technology. But, we also wanted to show them we were team players and fun to work with. So we put a big stack of classic childrens' books and movies on the table and said; "We are going to create a story together, and since all of you have kids, nieces and nephews and friends, we thought it would be a good start to remind us all of what makes up a great story! Please enjoy them." Two weeks later, we won the business.

The Lessons:
Find ways to delight clients
Take risks
Differentiate yourself

The Applications:
Prepare for presentations
Motivate employees and clients
Innovative thinking

FIGURE 5.3 Using the Story Matrix

story itself is outlined more fully so that we remember it. Second, the "moral" or "lessons" of the story are captured. Third, the "applications" are jotted down next to the moral of the story in order to provide the leader with a better understanding of what types of situations are best addressed with this particular story. Some people do this naturally, but the structure of the Story Matrix is designed to support those of us who need to be reminded of the lessons and applications of our stories.

Using the Story Matrix in Figure 5.3, a leader might, for instance, tell his team this story about client delight as a way to prepare them for an important presentation. The story illustrates how he wants them to think about ways to differentiate themselves in that presentation.

Figures 5.4 through 5.7 provide several examples of different types of Story Matrices for different types of leaders, including a senior executive, middle manager and sales leader, and even the Story Matrix of an entire division of a large enterprise.

STORY MATRIX – PARTNER/SENIOR EXECUTIVE

		Leadership Performance Skills					
		Motivation	Client Relationships	Teamwork	Engagement Scoping	Managing	Me
Story Types	Success	One down, two to go And then it happened...	Best in business Analysis failure/ relationship excellence	Friend or foe Friend or foe, part 2 Anytime, anywhere	Need a wide-angle lens! In and out of scope, and focus	Management can be fun! Santa's early this year	Back in the day... Chosen path
	Failure	This is not rain, it's pouring No second guessing Poker face	The one that got away Hurts so bad Long fight				
	Fun	Hands in the middle You really do have 9 lives!	Genuine fun Tennis anyone? Late nights, bad pizza				
	Legends	Model T Space race	The "Jerry Magu[...] handshake				

Figure 5.4 Story Matrix: Partner/Senior Executive

ANALYSIS FAILURE / RELATIONSHIP EXCELLENCE

The project team worked for four months to deliver analysis that would drive major marketing decisions within a deadline. A quality review just before the deadline revealed data processing errors that rendered the recommendations useless with insufficient time to fix the analysis before the deadline. The team told the client and rather than being upset, they were overwhelmingly impressed by our diligence and honesty. Further, they chose to commit to the new marketing approach because we worked so effectively with them over the prior four months that they trusted our judgment and really understood what we were suggesting and why it would work.

The Lessons:
Clients admire integrity, even if it brings unpleasant news
Relationships develop by the way you work, not deliverables

The Applications:
People who are facing an ethical dilemma
People who are struggling to communicate a failure
People who are overcome with a fear of failure

STORY MATRIX – SALES LEADER

		Leadership Performance Skills					
		Planning	Execution	Follow-through	Presentations	Teamwork	Me
Story Types	Success	Looking way down the road The 7 "P's" Whole lotta quota	See the future Disaster averted House of cards	Thank you note The pen Grab bag	Jaws of defeat Full color "Hello, Kinko's?"	I'm buying... Last man standing Go home	Climbing the mountain
	Failure	That one detail Driver's permit	It happens Spin Cycle "Steve!" "No. I am Scott"	Ringing the bell 26 urgent voice mails	Wearing plaid and walking tall Par five	Unprepared... uncool	Always closing Oversold Intimidated
	Fun	"Son of a preacher man" Gravitational pull The "closing" suit	False teeth 24 hours? In a row?? Narcolepsy				
	Legends	World map	Not ready for pri... time Small but mighty...				

Figure 5.5 Story Matrix: Sales Leader

"STEVE!" "NO. I AM SCOTT"

I was preparing for a very important client meeting where I would be meeting the decision-maker for the first time, after only seeing his picture in the Annual Report. I had done a lot of work getting a big proposal to this stage with his direct reports, and this would be the meeting where I would either close the deal or walk away empty-handed. I spent several hours preparing for any objections he might have and getting the documents ready. The appointed hour came. I stepped off the elevator in his office building just as the senior guy walked out of another elevator, so I looked at him and said: "Steve!" He said, very matter-of-factly: "Scott." I said: "No, my name is Jim." He frowned and said: "No, MY name is Scott!"

The Lessons:
The devil's in the details
If you make a mistake, admit it and recover

The Applications:
Cutting through the stress prior to a big presentation
Reminding people to cover the small details
Having some fun

STORY MATRIX – MIDDLE MANAGER, CONSUMER PACKAGED GOODS						
		Leadership Performance Skills				
		Managing/ Coaching	Supply Chain	Teamwork	Planning	Recruiting	Me
Story Types	Success	"Gravitas" Surrounded... Um....yes	Ethical dilemma Follow the leader "Can't get there from here..."	Angela	Mapquest? Love letter	Cold call Never stop talking	Farmer Don Happy Bottom
	Failure	No greater fan than me	Rotten berries BA Day	Postage meter	Wrong turn "Uh, I faxed it yesterday!"	Is this an interview? Seeking, searching, finding	Seen the worst? Same mistake, different day Swallowed whole
	Fun	Wildly unsuccessful! See a doctor	Nnnnnno	Swing batter	**Drop Forge** Pulp fiction	Good question! Contradiction Whoa...easy	Relief Good will, all around
	Legends	"If a tree falls in the forest..." "Do, or do not. There is no try."	Overnight? Sharp teeth!				

Figure 5.6 Story Matrix: Middle Manager, Consumer Packaged Goods

DROP FORGE

I was asked to take over an important client, and I went to meet the senior guy for the first time. He ran a "Drop Forge" that made golf-club heads, which I figured was just another average manufacturing company. I was in for an unpleasant surprise! I showed up, dressed in suit and tie, starched and trying to look the part of a knowledgeable vendor. The senior guy came in wearing jeans, a greasy shirt and a frown. He obviously didn't suffer fools. We sat down at his grungy conference table, and I started to tell him about what we could do for him. About 90 seconds into my spiel, the drop forge, which turned out to be a 40-ton hammer dropping four stories and stamping out metal clubs, dropped and shook the whole room as if it were a serious earthquake. I jumped up and shouted "What was that?" The senior guy just stared at me as if I were completely stupid (very close to home, it turns out). He said, "The forge. We're a forge, or didn't you know that?" So, there I sat for the remainder of the meeting, every 90 seconds being all but thrown from my chair while I suffered through a horrible, lame explanation of what we might be able to do for this guy's company! I can still see this guy walking out and telling his staff about the hilarious look of terror I had when the forge dropped for the first time!

The Lessons:

Never meet a new client or partner without knowing about what they do
Don't forget the details like materials, dress code, etc. that can derail a meeting

The Applications:

Planning for a transition
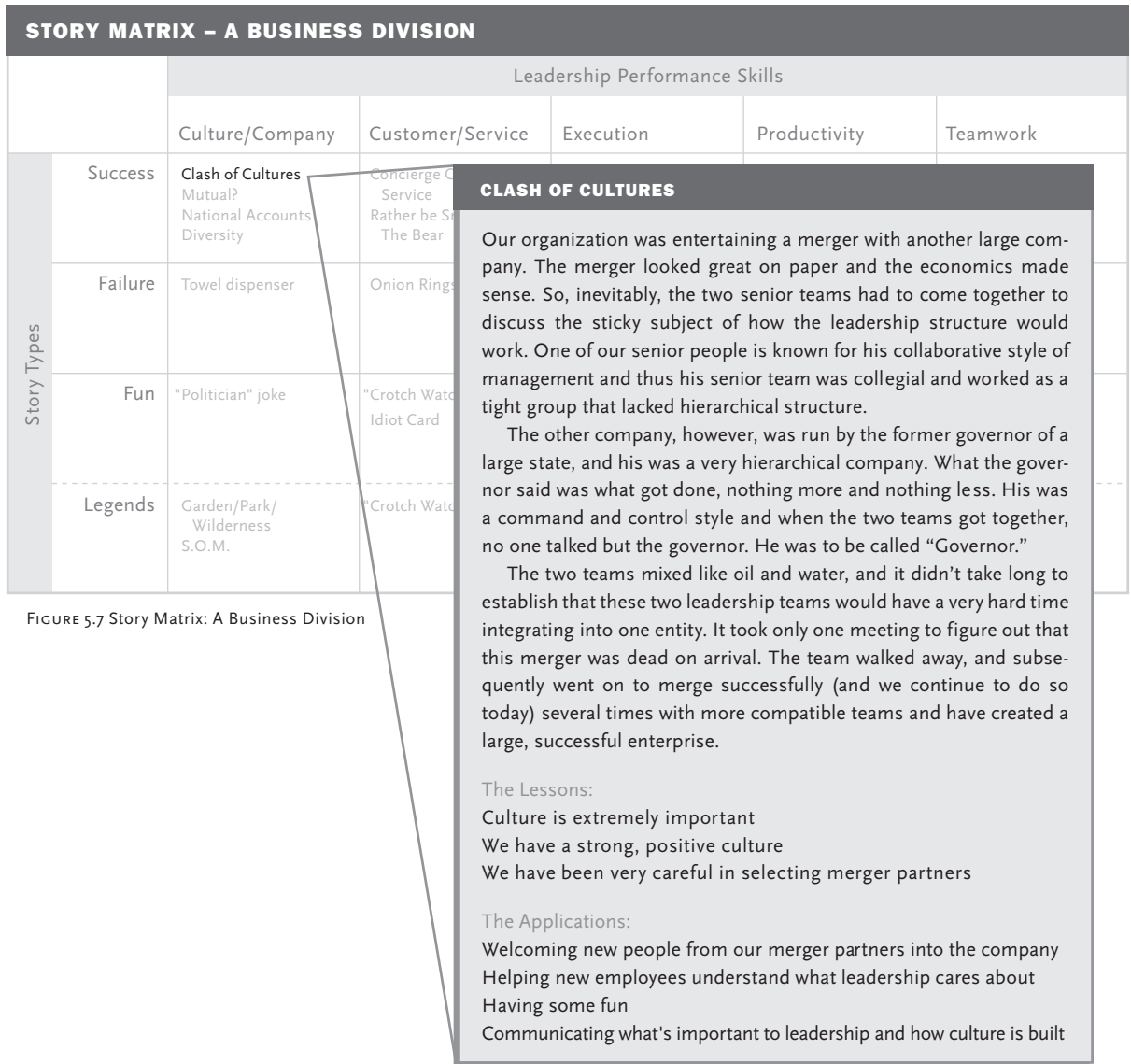Getting people prepared to face an unfamiliar situation
Having some fun

STORY MATRIX – A BUSINESS DIVISION

		Leadership Performance Skills				
		Culture/Company	Customer/Service	Execution	Productivity	Teamwork
Story Types	Success	Clash of Cultures Mutual? National Accounts Diversity	Concierge Service Rather be S... The Bear			
	Failure	Towel dispenser	Onion Rings			
	Fun	"Politician" joke	"Crotch Watc... Idiot Card			
	Legends	Garden/Park/ Wilderness S.O.M.	"Crotch Watc...			

Figure 5.7 Story Matrix: A Business Division

CLASH OF CULTURES

Our organization was entertaining a merger with another large company. The merger looked great on paper and the economics made sense. So, inevitably, the two senior teams had to come together to discuss the sticky subject of how the leadership structure would work. One of our senior people is known for his collaborative style of management and thus his senior team was collegial and worked as a tight group that lacked hierarchical structure.

The other company, however, was run by the former governor of a large state, and his was a very hierarchical company. What the governor said was what got done, nothing more and nothing less. His was a command and control style and when the two teams got together, no one talked but the governor. He was to be called "Governor."

The two teams mixed like oil and water, and it didn't take long to establish that these two leadership teams would have a very hard time integrating into one entity. It took only one meeting to figure out that this merger was dead on arrival. The team walked away, and subsequently went on to merge successfully (and we continue to do so today) several times with more compatible teams and have created a large, successful enterprise.

The Lessons:
Culture is extremely important
We have a strong, positive culture
We have been very careful in selecting merger partners

The Applications:
Welcoming new people from our merger partners into the company
Helping new employees understand what leadership cares about
Having some fun
Communicating what's important to leadership and how culture is built

What does this process of matching a story to a performance challenge actually look like? Figure 5.8 shows how a leader (in this case, a sales leader) can target the right stories to impact specific skills that need development. Just as the story of client delight above helped the team think through their differentiators, the leader on the left-hand side of Figure 5.8 has a salesperson who needs to improve performance in three areas: follow-through, presentation skills, and closing. The leader uses his Story Matrix to select three stories that illustrate each of these performance issues. The stories he tells his salesperson provide context for the performance issues that she is facing, and are far more effective than just saying to her, "Hey Leslie, we need to work on a few things: improve follow-through, tune presentation skills, and work on closing."
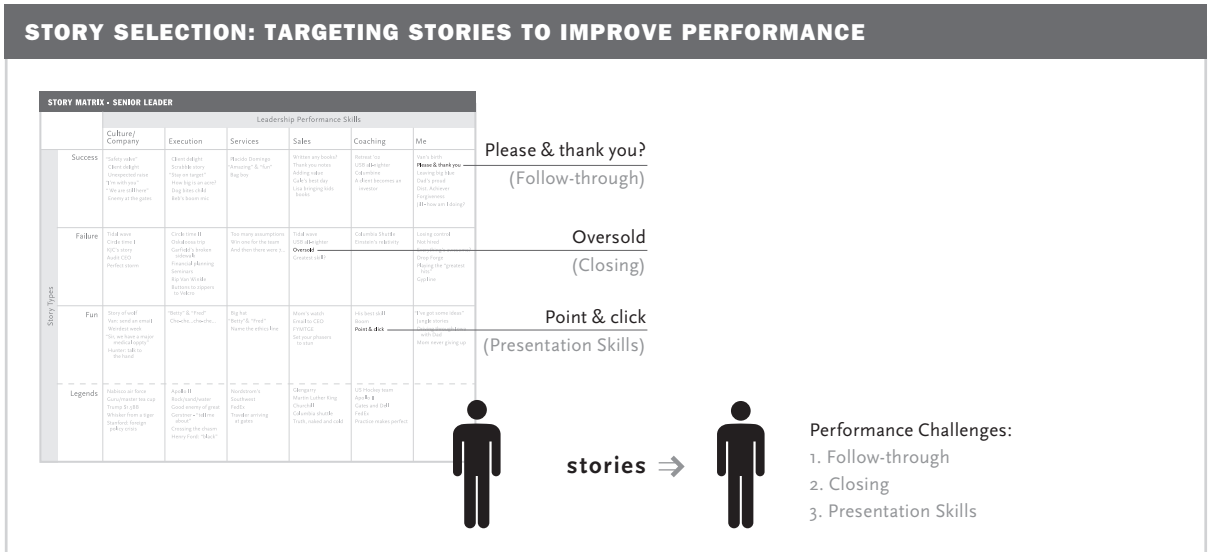
STORY SELECTION: TARGETING STORIES TO IMPROVE PERFORMANCE

FIGURE 5.8 Story Selection

"As I see it, an effective leader, as he/she makes the rounds at his/her organization, must ask one...and only one... question: 'GOT ANY GOOD STORIES?'"

– Tom Peters[12]

Some stories you will find yourself telling over and over again, and that's okay. But also be sure to keep adding to your Story Matrix. Some clients have actually used the Story Matrix to look back "on the stories that we have been telling ourselves." In this way, the stories help explain why they have been performing the way they have. Similarly, these clients have often used the Story Matrix to create the future. They ask, "What stories will we be telling at the end of this year?"

The Story Matrix answers a fundamental question that we are probably not accustomed to asking: How do I get access to the best stories about this particular challenge I'm facing?

When we read books and hire consultants to help us tackle the tough challenges in our work and lives, we often ask the wrong question. We ask, "What should I be doing differently and better?" While this is a perfectly appropriate question, it's asked too early in the cycle of managing performance and leading people. How can we understand and take action on the *what* until we know the *whys* and *hows?* Those come from experiencing stories that illustrate the whys and hows of similar challenges. Only then do we truly understand the *what* so that we can take action.

This is a process. You need not have every cell of every category filled in. As long as you have one or two stories from your Win Book in each category, you will be prepared and well-served. As you fill in your Story Matrix, it quickly becomes a powerful tool that you can use to be more consistent and intentional in your communications. Now it is time to put that Story Matrix to use and tell your stories.

Chapter 5:
SUMMARY

THE BITS AND BULLETS

- The Story Matrix is a tool that provides a way to categorize and access our stories.

- The Story Matrix allows us to look at our library of stories and gives us context to think deliberately about how to use a particular story to impact performance.

- The vertical axis of the Story Matrix is made up of the different types of stories that all leaders should be telling.

- The horizontal axis changes to mirror the most common challenges you face.

- Don't forget the "fun" layer of stories. Make it your responsibility to bring some fun to work.

- The Story Matrix is the "filter" that holds the gold nuggets after the mud and grit have been shaken away.

THE PICTURES

Sample Story Matrix
While the vertical axis stays the same, the horizontal axis is customized depending on how you serve the organization and your people

Story Matrix: Entrepreneur
Because an entrepreneur oversees all aspects of a small organization, he or she will have broad categories of stories like "Leadership," "Service," and "Sales"

Using the Story Matrix
Behind each story on the matrix, there is a short vignette, the lessons, and the applications of the story

Story Matrix: Partner/ Senior Executive

Story Matrix: Sales Leader

Story Matrix: Middle Manager

Story Matrix: A Business Division

Story Selection
Depending on the performance challenge you are facing, apply the right stories that help illustrate how to tackle that challenge

THE STORIES

When Have You Failed?
Are you sharing failure stories? If not, you are missing a tremendous opportunity to help yourself and others

Van's Birthday
Me stories are the stories you tell about yourself that illuminate who you truly are and what you believe in

Chapter 5:
MY THOUGHTS AND IDEAS